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## TEXAS TOURISM FY 2016 MARKETING PLAN

### **Mission Statement:**

*Texas Tourism's mission is to enhance and extend local economic development efforts by marketing Texas as a tourist destination in out-of-state domestic and international markets, thereby generating non-Texan travel to the state and ultimately creating revenues and jobs.*

*Texas Tourism provides a truly integrated marketing effort. The functions and services of each of the three interrelated program areas — advertising, public relations and travel research/development — support Texas Tourism's overall mission.*



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# TEXAS TOURISM

## FY 2016 MARKETING PLAN

### *Travel Research*

#### OVERVIEW:

Travel and tourism is a growing industry for Texas having outperformed the greater U.S. travel industry in both traveler spending and travel supported employment since 2000. In 2014, direct travel spending in Texas was estimated at \$70.6 billion, an increase of 4.7% over the previous year and the fifth consecutive year of expansion. Travel spending in Texas directly supported 630,000 jobs, and an additional 474,000 jobs indirectly across many industry sectors. Some examples include leisure and hospitality, transportation, retail trade, services, finance, real estate, construction, insurance, and others. Travel spending generated an estimated \$10 billion in state (\$3.7 billion), local (\$2.3 billion) and federal (\$4.0 billion) tax revenues in 2014.

Travel Research program goals include tracking the health of the Texas travel industry and providing primary data and analysis on travel to Texas Tourism to inform and track marketing and advertising activities. Travel research staff also serve as a resource for communities interested in encouraging tourism development. Primary travel and tourism research is conducted by contracted research vendors, with reports published to [www.travel.texas.gov](http://www.travel.texas.gov) throughout the year. Please visit the newly designed website to request access to research reports available to Texas travel industry partners covering topics that include economic impact, domestic travel, international travel, and hotel performance.

- Economic Impact: Annual report of the economic impact of travel to Texas primarily reports direct travel spending, employment, earnings, taxes generated for the state, seven tourism regions, MSA's, counties and select cities. Additional breakouts include visitor spending by accommodation category, visitor spending by commodity purchased, industry earnings and employment generated by travel spending. Spending, earnings, and employment data is also provided for Texas legislative districts. Additional analysis examines secondary employment and earnings impacts as well as travels impact on the Texas Gross State Product.
- Domestic Travel: Reports provide volume and share of travel, top origin designated marketing areas, purpose of stay, trip party composition/length of stay, trip expenditures, mode of transportation, type of accommodation, and demographic profiles for all seven Texas Tourism regions and the metropolitan areas that comprise each region.
- International Travel: Estimates for travel to Texas, spending and visitor profile information is available for top international markets such as: Mexico, Canada, the United Kingdom, Germany, China, Japan, Australia and Brazil.
- Hotel Performance: Quarterly reports provide estimates of hotel activity across the state modeled from hotel occupancy tax receipts collected by the Comptroller's Office. Hotel roomnights sold, hotel revenues and occupancy rates are available for the state, MSA's, counties and cities across Texas. Additional 10-year trend reports are available to allow for tracking of estimates over time.



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# TEXAS TOURISM

## FY 2016 MARKETING PLAN

### *Travel Research*

In addition to the research areas listed above, the Travel Research section conducts advertising effectiveness studies to measure the return on investment of Texas Tourism promotions. The most recent annual estimates, through May 2015, show that Texas Tourism advertising and promotion influenced 2.9 million non-Texan leisure trips, \$4.1 billion in direct spending and \$228.4 million in state taxes for an ROI of \$6.75 in state taxes for each dollar invested.

The following table lists the research plan of work for FY 2016, highlighting planned research services and primary data sources. Research estimates are used throughout the marketing plan to report calendar year 2014 travel trends. Forecasting data provided by the U.S. Department of Commerce and Tourism Economics for the US and Texas is included to assist with long-term market planning and are current as of June 2015.

### Travel Research Plan of Work (FY16)

RESEARCH SERVICES	DATA SOURCES
Economic Impact	Dean Runyan and Associates
Domestic Travel	D.K. Shifflet & Associates
International Travel	Travel Market Insights
Hotel Performance	Source Strategies, Inc.
Advertising Effectiveness & Accountability	Strategic Marketing and Research Insights
Other Professional Services, Information Services or Subscriptions	U.S. Department of Commerce Statistic Canada Tourism Economics London Publications



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# TEXAS TOURISM FY 2016 MARKETING PLAN

## *Advertising*

### OVERVIEW:

This award-winning advertising program is driven by the various themes: Texas. It's like a Whole Other Country, showcased in the domestic markets; and *Texas. De Todo Un Poco. Y Mas* – loosely translated: *Texas. A Little of Everything. And More* – in Spanish speaking Latin America markets. In other select markets the Texas patch logo is used without a tag line to promote international travel to Texas. Both the domestic and international advertising highlights the variety of travel and leisure experiences available in the Lone Star State. The campaign is designed to promote Texas as a premier travel destination through advertising in consumer and trade magazines, national cable television, radio, newspaper, out-of-home, online, the TravelTex.com website and mobile site.

The advertising program focuses primarily on a national campaign as it produces the greatest opportunity to reach all vacation travelers efficiently, while delivering the lowest cost per inquiry, highest awareness levels and largest return-on-investment. To influence shoulder season and winter travel to the state, OOH and other marketing initiatives are used in key markets. The top producing international markets are also targeted with an integrated advertising and marketing program in order to increase international travel to Texas.

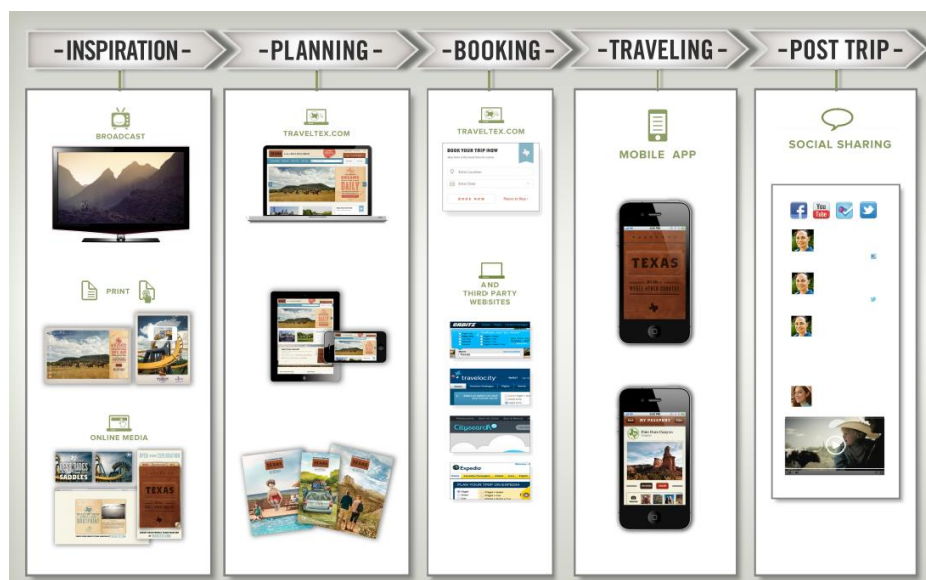
### OBJECTIVES:

- Use innovative advertising creative with powerful images and "call to action" messages together with an effective media placement strategy, to measurably increase the advertising return on investment, consumer inquires, engagement, time spent and/or consideration of Texas as a premier leisure vacation destination, advertising influenced travel to the state and advertising influenced spending in the state

- Measurably increase non-Texan vacation travel and overnight stays in hotels, motels, and other types of paid accommodations

- Engagement/awareness will be measured on engaged traffic to site, email signups, completed video views and app downloads

- Use advertising and marketing strategies, messages, images and media outlets that enhance the image of the State of Texas as a tourist destination, generate maximum consumer response that are at all times commensurate with the dignity of the State of Texas





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# TEXAS TOURISM

## FY 2016 MARKETING PLAN

### *Advertising- Domestic Media*

**TARGET AUDIENCE:** Texas Tourism has identified three target audience categories in which to build and maintain awareness of Texas as a premier vacation destination. The current campaign has delivered on influencing travel among our primary demographics while seeing a significant increase in millennial travel. Boomers maintain an overall impact as a majority of the segment travels to visit friends and relatives. Increasingly, millennials and Gen-X account for the majority of ad influenced travel and spending. Gen-X accounts for half of our incremental travelers and spending while millennials continue to have an increasing impact. Therefore, we are making slight adjustments to our media targeting to make the millennial audience our secondary target while maintaining a strong presence with the Boomers as a tertiary target demographic.

<b>Primary: Gen X</b>	<ul style="list-style-type: none"><li>• HHI \$60K+</li><li>• Children in HH under 18</li><li>• Leisure Travel</li><li>• 26% of Texas Travelers*</li></ul>	<b>Secondary: Adult Millennial</b>	<ul style="list-style-type: none"><li>• HHI \$40K+</li><li>• Leisure Travel</li><li>• 26% of Texas Travelers*</li></ul>	<b>Tertiary: Boomers</b>	<ul style="list-style-type: none"><li>• HHI \$60K+</li><li>• Leisure Travel</li><li>• 38% of Texas Travelers*</li></ul>
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\*2014 Texas Visitor Profile— non-resident overnight leisure person-days

#### OBJECTIVES:

- Positively change perceptions
- Drive inquiries
- Provide innovative co-op opportunities
- Increase advertising-influenced travel to the State
- Increase top of mind awareness of Texas as a destination

#### STRATEGIES:

- Balance media delivery to generational targets in relation to their importance recognizing that be universal
- Target generations based on passion points, digital targeting methods and print readership
- Cultivate multi-screen approaches for video content to mirror generational viewing habits
- Maintain presence in key travel decision making environments
- Utilize past proven performers to deliver low-funnel audience

#### TACTICS:

- Impactful placements and key content adjacencies for high-impact creative
- Multiple media and multi-screen touch points to reach all targets at inspiration and planning phases
- Year-long baseline plan with focus on key seasons
- Shoulder season promotion in key markets
- Support passion points in relevant placements
- Leverage mobile/tablet/social media opportunities
- Strategically engage users and breakthrough competitive clutter



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# TEXAS TOURISM

## FY 2016 MARKETING PLAN

### *Advertising- Domestic Media*

#### **DIGITAL:**

The Fiscal Year 2016 digital plan delivers a well-rounded mix across partner sites and networks and will help extend the awareness to our audience in all phases of the consumer journey when planning travel. Media placements will engage the users in travel specific content, passion point content with flash and rich display, video, engaging high-impact placements. Partners were selected on content, ability to target the generational targets, past performance, scale and efficiency of partners and the ability to deliver against the awareness and lead generation objectives.

A baseline plan will run for the full fiscal year with heavy up periods in the fall and spring in impressions and high impact units as consumers are constantly in market for travel in conjunction with continued presence within network media, mobile, search and social running throughout the year.

#### **TELEVISION:**

For Fiscal Year 2016, cable television will be used to build awareness and positively change consumer perception. Additionally, an interactive TV platform will be utilized again to enhance our national cable schedule. Interactive TV will be fully customized and allow users to engage with the Texas brand. At this time, networks and interactive TV platforms have not yet been determined.

#### **PRINT:**

National print titles have been selected to not only help raise awareness of Texas as a premiere travel destination, but to also clearly differentiate and positively change perceptions of the state. Through custom programs and added value opportunities, print will extend Texas' exposure while also generating inquiries for the Texas State Travel Guide. Titles were selected based on coverage of the generational targets, cost efficiencies, editorial relevance and overall marketing proposal.

In addition to the stand alone print programs, custom integrated programs will be utilized in Fiscal Year 2016. All programs allow for cross platform integration and seamless branding opportunities across print and digital. Integrated proposals were selected based on the strength of the overarching idea and tie in to Texas, ability to reach target(s), cost and reach of the program.



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# TEXAS TOURISM

## FY 2016 MARKETING PLAN

### *Advertising - International Media*

#### **OVERVIEW:**

International efforts will focus on the following markets and media strategies to generate travel to Texas:

- *Canada*
  - \* TV
  - \* Online display advertising
  - \* Search media
  - \* Social
  - \* Consumer/trade magazine
- *Mexico*
  - \* TV
  - \* Online display advertising
  - \* Search media
  - \* Newspaper
  - \* Consumer/trade magazine
  - \* Radio
  - \* Out of home media
  - \* Social
- *UK*
  - \* TV
  - \* Online display advertising
  - \* Search Media
  - \* Social
  - \* Newspaper
  - \* Consumer magazine
  - \* Radio
  - \* Out of home media
- *China & Japan*
  - \* Online display advertising
  - \* Search media
  - \* Consumer/trade magazine
- *Germany*
  - \* TV
  - \* Online display advertising
  - \* Search media
  - \* Social
  - \* Consumer magazine
  - \* Out of home media
- *Brazil*
  - \* Online display advertising
  - \* Search media
  - \* Consumer/trade magazine
  - \* TV
- *Australia*
  - \* Online display advertising
  - \* Search Media
  - \* Print
  - \* Out of home media
- *France*
  - \* Online display advertising
  - \* Search media
- *The Netherlands*
  - \* Online display advertising
  - \* Search media

#### **INTERNATIONAL OBJECTIVES:**

The advertising efforts in each country are aimed to build awareness of Texas as a premier vacation destination that appeals to all interests among the international consumer and travel trade audiences. Additionally, seek to leverage media to maximize inquiries/requests for travel packages while also providing co-op opportunities for partners in the international markets.

To view full International Media Plan please visit <http://travel.texas.gov>.



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# TEXAS TOURISM

## FY 2016 MARKETING PLAN

### *Advertising - Experiential Marketing*

#### EXPERIENTIAL MARKETING PLAN:

Texas on Tour provides consumers with a one-of-a-kind, tangible and entertaining experience, while educating them on the vacation opportunities available in Texas. It also provides continued communications beyond the exhibit, and the acquisition of opinion data to gauge perceptual feedback on the Texas travel product.

The tour features a live musician stage showcasing Texas talent, a green screen inviting participants to "Picture themselves in Texas" and a phone charging station. Texas on Tour also, interactively transports participants to Texas through five multi-media gaming experiences. Guests learn how Texas is truly like a whole other country by exploring the state through a life-size touch screen passport that highlights the variety of vacation experiences in Texas. It is a fully interactive experience that complements our advertising media campaign efforts and is designed to generate an emotional response from participants and entice them to visit Texas on their next vacation.

2015 Tour Events	Date	Location
Hollywood & Highland	4/25-4/26	Los Angeles, CA
Union Square SF	5/1-5/3	San Francisco, CA
Yonge-Dundas Square	5/27-5/29	Toronto, ON
Taste of Charlotte	6/5-6/7	Charlotte, NC
CMA Music Festival	6/11-6/14	Nashville, TN
San Diego County Fair	6/30-7/5	San Diego, CA
Ohio State Fair	7/30-8/2	Columbus, OH
Musikfest	8/7-8/9	Bethlehem, PA
Chicago Air & Water	8/15-8/16	Chicago, IL
Iowa State Fair	8/21-8/23	Des Moines, IA
Minnesota State Fair	8/27-9/7	St. Paul, MN
Taste of St. Louis	9/18-9/20	St. Louis, MO
The Big E	9/30-10/4	West Springfield, MA

The 2015 Texas on Tour experience is traveling to markets throughout the U.S. and experiencing great results.

#### 2014 TEXAS ON TOUR HIGHLIGHTS:

- Texas On Tour traveled to 13 markets in 2014, generating 551,362 impressions
- More than 32,000 people registered on-site at the 2014 events
- Based on post-event survey, one quarter of 2014 respondents reported they had been to Texas six months after their Texas On Tour experience
- Generated more than \$8.9 MM in additional estimated revenue





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# TEXAS TOURISM

## FY 2016 MARKETING PLAN

### *Advertising- Co-Op*

#### **CO-OPERATIVE OPPORTUNITIES:**

The 2016 Co-op Advertising is currently in development and will be available for purchase in September 2015. Please visit <http://travel.texas.gov/advertising-marketing/> for more information and to view the current co-op opportunities.



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# TEXAS TOURISM

## FY 2016 MARKETING PLAN

### *Public Relations*

#### **OVERVIEW:**

This area works proactively to target consumers and works with the travel trade and media industries throughout the United States and international markets including Mexico, Canada, Europe, Latin America and Asia. Through trade shows, sales and media missions, trade and media familiarization tours, educational seminars, and consumer promotions; Public Relations provides first-hand promotion of the Texas leisure travel and meetings market product. Public Relations creates co-op opportunities for travel industry partners, as well as offers travel trade and media leads online to industry partners at [www.travel.texas.gov](http://www.travel.texas.gov).

#### **OBJECTIVES:**

- Increase travel to Texas
- Build and maintain awareness and packaging of Texas as a premier vacation and meeting destination, targeting domestic and international audiences with the highest propensity for travel
- Increase awareness of the many and diverse travel experiences throughout Texas
- Market Texas as a meeting/convention destination
- Emphasize digital and social media delivery to drive consumer engagement

#### **STRATEGIES:**

- Market Texas at travel trade events and tradeshow in key markets
- Organize sales and media missions to primary markets, allowing in-state travel partners co-op opportunities to sell their travel product
- Conduct media and travel trade familiarization tours
- Market the Texas travel product at consumer shows
- Work cooperatively with travel industry (i.e. tour operators, airlines, hotels, etc.) to increase Texas product packaging and leverage their extended consumer audience reach
- Leverage emerging media opportunities such as digital, mobile and social channels to extend the Texas brand message, engage potential visitors and encourage viral activities
- Contract full-time representation or ad-hoc services as necessary within markets to assist in marketing the Texas travel product to consumers, travel trade, meetings and media markets



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# TEXAS TOURISM

## FY 2016 MARKETING PLAN

*United States*

### OVERVIEW:

Visitor volume to U.S. destinations increased by 4.4% in 2014 with leisure travel growing slightly faster than business (4.5% and 4.2% respectively). Popular activities for U.S. travelers on either a leisure or business trip in 2014 include visiting friends and relatives, a culinary/dining experience, shopping, visiting historic sites, nightlife, touring/sightseeing, concerts/theatre/dance, museums/art exhibits, parks (national or state), and others.

Marketing and public relations activities will encourage engagement around these activities along with other events and attractions around the state of interest to travelers. Unique Texas experiences will be highlighted in traditional media, hybrid media, social media and owned media through a comprehensive public relations program. Marketing and public relations activities will target consumers, media and travel trade audiences in key domestic markets.

The visitor data below represents all domestic travel to Texas destinations (leisure, business, resident, non-resident, day trip or overnight) while the target audience data looks at non-resident overnight leisure visitors to Texas only. On average, travelers from outside of Texas stay longer and spend more per visit than in-state travelers.

### VISITOR DATA:

Domestic visitor volume to Texas destinations in 2014 was estimated at 243 million person-stays (visitors), an increase of 4.2%. Leisure travel related purposes account for roughly 70% of domestic travel to or within the state with the remaining 30% for business related purposes. Business travel increased faster than leisure travel at Texas destinations in 2014 (6.3% versus 3.4% respectively), following two years of leisure travel being the faster growing segment. The table below shows top Texas destinations for domestic travel by Metropolitan Statistical Area (MSA's) and rural or counties not within an MSA.

#### DOMESTIC VISITORS TO TEXAS DESTINATIONS (2014)

Top Five Texas Destinations by MSA (millions)		Texas Destinations by MSA (3,000,000 - 6,000,000 visitors)	Texas Destinations by MSA (1,000,000 to 3,000,000 visitors)
Dallas-Fort Worth-Arlington	49.3	Lubbock	Tyler
Houston-Baytown-Sugarland	40.7	Amarillo	Longview
San Antonio	31.7	College Station-Bryan	Midland
Austin-Round Rock	22.6	Waco	Texarkana
Corpus Christi	8.95	Killeen-Temple-Fort Hood	Sherman-Denison
		Brownsville-Harlingen	Wichita Falls
		Abilene	Laredo
		Beaumont-Port Arthur	Victoria
		El Paso	San Angelo
		McAllen-Edinburg-Pharr	Odessa

Note: Rural or counties not within an MSA was 35.7 million. For MSA definitions visit:  
[www.census.gov/population/metro/](http://www.census.gov/population/metro/)

Source: Data displayed in Person-Stays (visitors), D.K. Shifflet & Associates.



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# TEXAS TOURISM FY 2016 MARKETING PLAN

*United States*

## TARGET AUDIENCE:

In 2014, non-resident leisure travel to Texas continued to grow across all measures. Visitor volume increased by 5.3% which was higher than overall leisure travel across the state. Non-resident overnight leisure travelers to Texas stayed an average of 3.4 nights and spent an average of \$114 per person per day. Summer and spring were the most popular travel seasons. Travelers who participate in any activity on average are more valuable, with higher per party spending than those who do not participate in an activity on their trip.

**NON-RESIDENT OVERNIGHT LEISURE VISITORS PROFILE (2014)**

Average Trip	Popular Travel Seasons	Top Activities
Length of Stay - 3.4 nights Daily Spending - \$114	Summer (32%) Spring (29%) Winter (22%) Fall (17%)	Visit Friends/Relatives Culinary/Dining Shopping Historic Sites Touring/Sightseeing Museums/Art Exhibits Nightlife Parks (National/State) Concerts/Theater/Dance

Texas draws visitors from across the country. The top ten origin Designated Marketing Area's (as defined by Nielsen Media Research, Inc.) in 2014 for non-resident overnight leisure travelers to Texas, accounting for 32.4% of travel, were Oklahoma City, OK; New York, NY; Los Angeles, CA; Tulsa, OK; New Orleans, LA; Albuquerque–Santa Fe, NM; Little Rock-Pine Bluff, AR; Chicago, IL; Phoenix, AZ; and St. Louis, MO. The top five states, accounting for nearly 40% of travel, were Louisiana, California, Oklahoma, New York and Florida.



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# TEXAS TOURISM FY 2016 MARKETING PLAN *United States*

Media Missions and Events:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
Society of American Travel Writers Convention	Oct 4-9, 2015	Las Vegas, NV
NYC Media Mission	Oct 20-21, 2015	New York City, NY
Southern Living Editorial Media Mission	Feb 2016	Birmingham, AL
Near Market Media Mission	April 6, 2016	Atlanta, Georgia
Travel Media Showcase	Aug 2016	Grapevine, TX
Travel Trade Events:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
RTO Summit	Nov 16-17, 2015	Orlando, FL
Texas Association Market Event in D.C.	Dec 9, 2015	Washington, D.C.
American Bus Association	Jan 9-12, 2016	Louisville, KY
Go West Summit	Feb 22-25, 2016	Anchorage, AK
IPW	June 18-22, 2016	New Orleans, LA
Reverse Receptive Sales Mission	July 1, 2016	TBD
Travel Industry Events:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
TTIA Travel Summit	Sept 20-23, 2015	San Antonio, TX
TTIA Unity Dinner	Feb 23, 2016	Austin, TX
WTTC Global Summit	Mar 5-9, 2016	Dallas, TX
TTIA Texas Travel Fair	TBD	TBD
Texas Travel and Tourism Week	May 1-7, 2016	Austin, TX
DMAI Annual Conference	July 31 – Aug3, 2016	Minneapolis, MN
Texas Association of Convention Visitors Bureau Annual Conference	Aug 15-19, 2016	El Paso, TX
ESTO 2016	Aug 27-30, 2016	Boca Raton, FL



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# TEXAS TOURISM FY 2016 MARKETING PLAN

*Mexico*

## OVERVIEW:

Mexican travelers are drawn to Texas because of its diversity, infrastructure and premiere travel and tourism services. Due to unique proximity, Mexican visitors especially enjoy the shopping experience in Texas, along with the ability to take advantage of tax-free shopping options. Visitors also enjoy the state's entertainment, amusement parks and cosmopolitan environments. The majority of Mexican travelers book their flight within two weeks of their departure, with Border States requiring less time for their planning and more distant states planning further ahead of their departure date.

Wholesale operators continue to be an important distribution channel in the Mexican travel and tourism market with wholesalers selling their packages to travel agents who then provide the travel services to consumers. This is particularly important for Mexicans traveling to the U.S. and Texas by air, however the majority of Mexican visitors to Texas arrive by land. Direct consumer marketing becomes more important for the Mexican drive market to keep Texas both top of mind as an easy to reach destination where they can find the products and experiences they desire.

There are approximately 125 daily flights from Mexico cities to Texas and 2016 looks promising for Mexican travelers, with a significant increase in flights to major cities throughout Texas. Volaris flights between Guadalajara and DFW and between Guadalajara and Houston Intercontinental Airport (IAH) will begin to take flight in Fiscal 2016. Viva Aerobus has a flight between Mexico City and IAH. Interjet will also begin flying between Mexico City and IAH. Rounding out the list, Spirit Airlines launched flights between IAH and Cancun, San Jose del Cabo and Toluca in June 2015.

## VISITOR DATA:

An estimated 7.7 million travelers from Mexico visited Texas in 2014 generating \$4.5 billion in direct spending. The majority of Mexican visitors to Texas travel by land with air travel accounting for 457,000 arrivals. Texas welcomed 19% of all Mexican air arrivals to the United States or roughly one out of every five visitors. Top states for travel from Mexico to Texas include the State of Mexico and Mexico City, Nuevo Leon, Chihuahua, Jalisco and Guanajuato. Roughly one-third of Texas visitors travel from State of Mexico and Mexico City, while neighboring border-states like Nuevo Leon and Chihuahua are overrepresented in travel to Texas compared to population size due to their proximity. Travel from Mexico to Texas is projected to increase by 32.6% by 2020.

MEXICO TO TEXAS (2014)
Visitor Volume: 7.7 million
Direct Travel Spending: \$4.5 billion
Avg Nights (only air): 6.2

Arrivals from Mexico to the United States were estimated at 17.33 million in 2014, an increase of 19% over the previous year. Mexico is the second largest market for international travel arrivals to the United States, behind only Canada. Direct spending from Mexico was estimated at \$19.3 billion, an increase of 7%. Although the second largest market by arrivals, Mexico ranks third by direct spending behind Canada and for the first time China. Arrivals in 2014 increased faster than spending indicating that Mexican visitors on average are spending less than the prior year. Travel from Mexico to the United States is forecasted to increase by 37% by 2020 with an annual growth rate of 5.3%.



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# TEXAS TOURISM FY 2016 MARKETING PLAN

*Mexico*

## MARKETING ACTIVITIES:

Texas Tourism's strategy for Fiscal Year 2016 is to promote Texas as a premier travel destination to the Mexico market. Recognizing top passion points for the Mexican market, Texas Tourism will continue to develop creative and proactive marketing activities to reach the diverse population in Mexico. Texas Tourism will ensure that Texas is prominently positioned in the market, with travel trade, media and final consumers. Our program during this fiscal year will be primarily focused on developing effective partnerships, programs and promotions to enhance the brand visibility within Mexico.

Wholesalers and travel agencies continue to be an important channel in Mexico, we will focus our resources and activities to encompass events where we will have a strong showing and reach a broader audience of travel trade professionals. With the addition of a second reverse mission and the inclusion of a Sales and Media Mission to Mexico, our trade activities will have a deeper reach in fiscal year 2016. Texas is no longer solely being sought after as a shopping destination by Mexican travelers. To stay competitive Texas has to also be recognized for our outstanding cuisine, world class entertainment, luxury experiences, amusement parks, professional sports and culture. Texas Tourism activities in fiscal year 2016 will work to broaden the consumer knowledge of the diverse experiences Texas offers.

In addition to our scheduled marketing co-op opportunities, Texas Tourism will continue ongoing media and trade outreach, media and trade familiarization tours, consumer promotions, monthly newsletters to trade, media and the meetings market, managing the TravelTex.mx Spanish microsite and social media activities and Texas Tourism's Mexico Facebook page.

Sales Missions:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
Reverse Mexico Mission	October 30, 2015	San Antonio, Texas
Reverse Mexico/Canada Mission RGV	April 11, 2016	South Padre Island, Texas
Sales and Media Mission	May 16-20, 2016	Mexico City, Mexico
Travel Trade Shows:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
#NEXT Travel Trade Exchange	April 25 – 28, 2016	Quintana Roo, Mexico
ARLAG	TBD	Guadalajara, Mexico



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# TEXAS TOURISM FY 2016 MARKETING PLAN

*Canada*

## OVERVIEW:

Canada is the largest market for travel and tourism to the United States by both visitation and travel spending. Popular activities that motivate Canadians to travel to Texas include: shopping, visiting a historic site, visiting a museum or art gallery, sightseeing, visiting a zoo or aquarium, attending an event (including sports, a play, concert, festival or fair). Beaches, cruising and other year round Texas outdoor activities provide escape from Canadian winters while encouraging longer stays.

Canada's population is expected to grow to 37.3 million by 2018 (increase of 5.7%) and also age during the next four years. Both will have a positive influence on outbound leisure travel through 2018. The direction of the Canadian economy remains uncertain as oil prices and the U.S./Canada exchange rate fluctuates. The Canadian dollar is currently hovering around U.S. \$0.80 and forecasters are predicting the Canadian dollar to stay devalued for about the next two years. With respect to travel to U.S. destinations, stressing value for vacation dollar will be a paramount message to promote. The lower Canadian dollar will affect not only exchange rate sensitive outbound travelers, but other travelers as many of the costs for tour operators, airlines and travel insurers are in U.S. dollars.

The majority of Canadian visitors to Texas destinations fly versus drive. Continuing as a positive market development in 2014 and 2015 was WestJet's second year of service between Calgary and DFW. WestJet is Canada's second largest Canadian air carrier and ninth largest airline in North America by passengers carried. The continuation of their direct service from Calgary will have a positive effect on driving interest in Texas from Western Canada and increase arrivals to destinations throughout the state. Earlier this year, WestJet announced that it will launch Calgary – Houston service in September 2015. Air Canada also started Toronto – Austin daily non-stop service May 18, 2015 which is a wonderful complement to the airline's existing non-stop service into DFW and Houston.

## VISITOR DATA:

The most recent estimates available for Canada show that an estimated 465,000 travelers visited Texas in 2013 and generated nearly \$430 million in direct spending. Estimates for Canadian travel to Texas should be available in the fall of 2015 from Statistics Canada. Ontario is the largest province by population in Canada as well as the largest source market within the country for Texas travelers. Travel from Canada to Texas is forecasted to increase by 31.3% by 2020.

CANADA TO TEXAS (2013)
Visitor Volume: 465,000
Direct Travel Spending: \$430 million
Avg Nights: 12

Arrivals from Canada to the United States in 2014 were estimated at 23.00 million, a decrease of 2% compared to the previous year. The decline follows four years of record-breaking visitation and was strongly influenced by a decline in one-night auto visitors who may have been influenced by currency depreciations. Canada was the largest market for international arrivals for the country accounting for almost a third of all arrivals. Direct spending from Canada was estimated at \$27.2 billion, also a decrease of 2% from the previous year. Travel from Canada to the United States is forecasted to increase by 14.8% by 2020 with an annual growth rate of 2.3%.





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# TEXAS TOURISM FY 2016 MARKETING PLAN

Canada

## MARKETING ACTIVITIES:

Texas Tourism's strategy for Fiscal Year 2016 is to promote Texas as a destination of infinite exciting and inspirational vacation possibilities; a place where everything is possible, endless experiences for every type of Canadian traveler. We will develop a creative and proactive program of trade based activities that will enhance the position of Texas in the minds of key trade and distribution networks. We will also ensure that Texas is prominently positioned with the travel trade and key distribution networks in market. Our program will be primarily focused on developing effective co-op partnerships, programs and promotions in tourism distribution channels, sales programs and training efforts.

We will focus our resources on the primary markets in Canada: Ontario, Western Canada (prime provincial targets – Alberta and British Columbia) and Quebec. Secondary markets include Manitoba and Eastern/Atlantic Canada.

According to the recent visitor profile study conducted by Strategic Marketing & Research Insights (SMARInsights), top activities that motivated Canadians to visit Texas were shopping, historic sites/attractions, art/culture, music/entertainment/nightlife, culinary/dining, parks and beaches. Image attributes that are existing strengths important to promote are hospitality/friendly people, value and family vacations.

The SMARInsights study also showed Canadians continue to use traditional travel agents, search engines, hotel websites, travel review sites, OTA's and city websites when planning trips. The Texas travel planning period varies to some degree by province, with Ontario residents requiring less time and Alberta/other province residents planning further ahead.

We will focus on key messages, themes and key motivational drivers and reinforce them in our promotions, webinars, pro-active outreach and travel agent booking incentives. Our tour operator partners would complement our themes in their trade communication during the period including emails, sales calls and FAM trips.

Sales and Media Mission:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
Texas on Tour Sales & Media Blitz	Nov 9-13, 2015	Hamilton, London & Barrie
NXNE North by Northeast	June 2016	Toronto, Canada
Travel Trade Consumer & Shows:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
Salon International Tourisme Voyages	Oct 23 – 25, 2015	Montreal, Canada
Maritime Travel Conference	Nov 20-21, 2015	Halifax, Canada
Outdoor Adventure & Travel Show	Feb 19 – 21, 2016	Toronto, Canada
Outdoor Adventure & Travel Show	Mar 19 – 20, 2016	Calgary, Canada
The Ottawa Travel & Vacation Show	April 9 – 10, 2016	Ottawa, Canada
Cruise 3 Sixty	June 1 – 6, 2016	Vancouver, Canada
Cruise 3 Sixty Secondary Event	June 1, 2016	Vancouver, Canada



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# TEXAS TOURISM FY 2016 MARKETING PLAN

*Brazil*

## OVERVIEW:

Brazil is currently facing economic pressures that reflect a high inflation rate and the rise in the value of the dollar versus the Real, which makes the U.S. a more expensive destination for Brazilians. Brazilians will continue traveling to the U.S., but are most likely altering travel behavior. Brazilian travelers, in general, could become more budget conscious when selecting accommodations, meals, shopping destinations and attractions. While travel to the US from Brazil reached record numbers in 2014 and is projected to grow, growth rates have slowed. Brazil will soon enter into the U.S. Global Entry Program which will allow frequent travelers to avoid long lines at immigration checkpoints as they arrive in the U.S., making the travel experience better for Brazilians. Brazilian's main activity in Texas is shopping (90%).

Recently United Airlines has purchased 5% of Azul Airlines a domestic carrier and will eventually allow United to have domestic connections to Houston. Also, United is promoting the introduction of the 787 Dreamliner on their route from Sao Paulo to Houston.

## VISITOR DATA:

An estimated 68,000 travelers from Brazil visited Texas in 2014, a slight decline (-2.9%) from the previous year. Although current visitor estimates are down from the records achieved in 2011 and 2012 the market is still strong based on historical trends. Travelers from Brazil spent an average of 11.4 nights in Texas and generated \$122 million in direct spending. Travel from Brazil to Texas is forecasted to increase by 82.8% by 2020.

BRAZIL TO TEXAS (2014)
Visitor Volume: 68,000
Direct Travel Spending: \$122 million
Avg Nights: 11.4

Arrivals from Brazil to the United States were estimated at 2.26 million in 2014. Growth in the market slowed compared to previous year but still resulted in a 10% increase. Direct spending from Brazil was estimated at \$13.0 billion, a 5% increase from the previous year. This increase also reflects slower growth compared to the previous decade where Brazil recorded an average increase of 22% annually in spending. Travel from Brazil to the United States is forecast to increase 37.9% by 2020.

## MARKETING ACTIVITIES:

Texas Tourism promotes the state's travel product directly to the Brazilian consumer through advertising, media activities and co-op marketing activities. Packaged travel is obtained from travel agents or directly through tour operators, both of which are still important parts of the Brazilian international travel purchase process. An increasing number of travelers are obtaining long-haul travel online and Texas will be driving several consumer promotions to increase awareness. Texas Tourism focuses marketing efforts on tour operators and travel agents to increase Texas product offering and knowledge of the destination. To achieve these goals, Texas Tourism coordinates travel show presence and sales missions in Brazil and in Texas, travel agent training, and familiarization tours for travel trade and media.



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# TEXAS TOURISM

## FY 2016 MARKETING PLAN

*Brazil*

In addition to our scheduled marketing co-op opportunities, Texas Tourism will continue ongoing media and trade outreach, media and trade familiarization tours, newsletters to trade and media, managing the TravelTex.br, the Portuguese language microsite.

Travel Trade Shows:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
World Trade Market (WTM) Latin America	March 29-31, 2016	Sao Paulo, Brazil
Brazilian Sales & Media Mission	(TBD)	Sao Paulo, Belo Horizonte and Brasilia, Brazil
Travel Trade Training:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
Visit USA Brazil	TBD 2016	Campinas & Rio de Janeiro, Brazil



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# TEXAS TOURISM

## FY 2016 MARKETING PLAN

### *United Kingdom*

#### OVERVIEW:

UK travelers report that Texas is a desirable destination due to its unique cities, shopping, quality cuisine, the great outdoors and the large diversity of entertainment. With direct flights to three Texas cities, traveling to Texas is easier than ever with a steadily increasing number of travelers purchasing their trips through online methods or directly with airlines rather than going through tour operators. The slight decrease in visitor numbers for 2014 may be due to the gain of the dollar versus the British pound making travel to the US more expensive for UK travelers. Contrary to the currency exchange impact, there is an interesting trend of an increase in demand for luxury travel and five-star accommodations.

#### VISITOR DATA:

An estimated 171,000 travelers from the United Kingdom visited Texas in 2014, a decrease from 226,000. This decline follows a record year of growth and was primarily a result of a drop in VFR travel. Despite the decline, the UK is still the largest overseas market for the state accounting for more than one in ten overseas visitors.

Travelers from the UK in 2014 stayed an average of 11.9 nights in Texas and generated \$160 million in direct spending. Travel from the UK to Texas is forecasted to increase by 48.8% by 2020.

UK TO TEXAS (2014)
Visitor Volume: 171,000
Direct Travel Spending: \$160 million
Avg Nights: 11

Arrivals from the United Kingdom to the United States were estimated at 3.97 million, an increase of 4% over the previous year. Despite two years of growth the market still remains below the record level of arrivals set in 2000. Direct spending from the UK in the US was virtually unchanged in 2014 at \$13.2 billion. Travel from the UK to the US is forecasted to increase by 18.2% by 2020.

#### MARKETING ACTIVITIES:

In order to increase awareness and demand for the diverse Texas travel products, Texas Tourism promotes directly to United Kingdom consumers through various media activities and consumer marketing activities. Packaged travel obtained from travel agents or direct from tour operators is still an important part of the UK international travel purchase process but a growing number are using online tools (OTAs). Texas Tourism will evaluate promotions offered to further increase this business while also focusing marketing efforts on tour operators and travel agents to increase their Texas product offering and consumer's knowledge of the destination. To achieve these goals, Texas Tourism coordinates trade and consumer show presence and sales missions, develops and coordinates co-op marketing opportunities, conducts travel agent training and hosts familiarization tours for travel trade and media.

Travel Trade Shows:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
World Travel Market	Nov 2-5, 2015	London, England
UK Sales & Media Mission	March 7-8, 2016	London, England
Visit USA	July, 2016	London, England

\*More activities pending



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# TEXAS TOURISM FY 2016 MARKETING PLAN

## Germany

### OVERVIEW:

The German traveler is undergoing a slow but steady change from purchasing vacations from tour operators to booking directly through airlines and OTAs. Tour operators are extending specials to optimize revenue with early bookings but continue to report a decrease in revenue. Beaches, the great outdoors and family vacations are among the most popular themes with a new interest in luxury travel by middle-class consumers. The civil aviation tax, the decline of the Euro against the dollar and inclusion in the emission trade system all contribute to an increase in the price of travel to the U.S. which has curbed some of the demand for extended vacations.

### VISITOR DATA:

An estimated 110,000 travelers from Germany visited Texas in 2014, a slight decrease of less than 1% from the previous year. Although growth from Germany has been flat in recent years the market is still performing above the ten year average for Texas market share. Travelers from Germany in 2014 stayed an average of 11.2 nights and generated \$94 million in direct spending. Travel from Germany to Texas is forecasted to increase by 35.2% by 2014 with an annual growth rate of 5.2%.

GERMANY TO TEXAS (2014)
Visitor Volume: 110,000
Direct Travel Spending: \$94 million
Avg Nights: 11.2

Arrivals from Germany to the United States were estimated at 1.97 million, an increase of 3% over the previous year. Germany has experienced steady growth over the past five years but has fallen behind emerging markets China and Brazil for total arrivals. Direct spending from Germany increased by 2% to \$7.4 billion but again failed to keep pace with some emerging markets. Travel from Germany to the United States is forecasted to increase by 10.4% by 2020.

### MARKETING ACTIVITIES:

Within this market, Texas Tourism promotes the state's travel product directly to consumers through media and trade co-op marketing activities, with an ultimate goal of increasing both consumer awareness and demand for the destination. While packaged travel obtained from travel agents or directly from tour operators is still an important part of the German long-haul travel purchase process, the technologically advanced consumers in this country have shown massive growth in online purchases in the last two years. Though they still book with trusted German travel entities, they now conduct most research electronically. Because of this, Texas Tourism supports marketing efforts with tour operators and travel agents to increase Texas product offering and consumer knowledge of the destination, while maintaining a strong online branding presence with frequent consumer promotions. To achieve these goals Texas Tourism coordinates travel show presence, sales and media missions, develops and coordinates co-op marketing opportunities and conducts travel agent training and hosts familiarization tours for travel trade and media.

Travel Trade Shows:		
Event	Date	Location
ITB	March 9 -13, 2016	Berlin, Germany
IMEX – Frankfurt	April 19 – 21, 2016	Frankfurt, Germany
German and Dutch Sales and Media Mission	TBD	TBD

\*More activities pending



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# TEXAS TOURISM FY 2016 MARKETING PLAN

## *France*

### OVERVIEW:

French international travelers look for cultural events and have a preference for escorted tours that allow for a more carefully managed budget. Direct flights from Paris to IAH and DFW are performing well but the decline of the Euro against the US dollar results in the U.S. not being the bargain it has been in previous years.

### VISITOR DATA:

An estimated 55,000 travelers from France visited Texas in 2014, a slight decline of 3.5% from the previous year. These visitors stayed an average of 9.5 nights in Texas generating \$46 million in direct spending. Travel from France to Texas is forecast to increase by 24.8% by 2020 with an annual growth rate of 3.8%.

FRANCE TO TEXAS (2014)
Visitor Volume: 55,000
Direct Travel Spending: \$46 million
Avg Nights: 9.5

Arrivals from France to the United States were estimated at 1.62 million in 2014, an increase of 8%. Although France does not rank among the ten largest markets for the US by spending they did generate a record breaking \$5.7 billion in direct spending in 2014. Travel from France to the United States is forecast to increase by 22.9% by 2020.

## *The Netherlands*

### OVERVIEW:

The USA is a top overseas destination for the Benelux region and the Dutch have an average of 35 vacations days per year. Travelers from this market often choose warmer climates. The cowboy experience on Texas ranches, the wide open space and the great outdoors are popular experiences as are other leisure related activities.

### VISITOR DATA:

An estimated 52,000 travelers from the Netherlands visited Texas in 2014, a slight decline of 5.5% from the previous year. These visitors stayed an average of 9.7 nights. Travel from the Netherlands to Texas is forecasted to increase by 37.6% by 2020.

NETHERLANDS TO TEXAS (2014)
Visitor Volume: 52,000
Direct Travel Spending: N/A
Avg Nights: 9.7

Arrivals from the Netherlands to the United States were estimated at 616,000 in 2014, an increase of 4.5%. Travel from the Netherlands to the United States is forecasted to increase by 12.7% with an annual growth rate of 2.0%. Direct spending data for travelers from the Netherlands has not been released for the U.S. or Texas at this time.



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# TEXAS TOURISM

## FY 2016 MARKETING PLAN

### *France/The Netherlands*

#### **MARKETING ACTIVITIES:**

Within the secondary feeder markets in Europe, Texas Tourism promotes the state's travel product directly to European consumers through advertising, media and co-op marketing activities in order to increase awareness and demand for the destination. Packaged travel obtained from travel agents or directly from tour operators is still an important part of the European international long-haul travel purchase process. Because of this, Texas Tourism markets to tour operators and travel agents to increase Texas product offering and knowledge of the destination. To achieve these goals Texas Tourism markets the Texas travel product to tour operators at European and international trade shows while developing and coordinating co-op marketing opportunities, training travel agents and hosting familiarization tours for travel trade and media.



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# TEXAS TOURISM FY 2016 MARKETING PLAN

*China*

## OVERVIEW:

The fast growing economy and travel industry in China is valuable due to high levels of spending, lengthy durations of stay, and future growth estimates. As more Chinese enter the middle class they are able to travel abroad and the United States has always been at the top of their destination list. The US tourism industry can expect to see as many as 2.85 million Chinese visitors in 2015, where they will spend more than \$15 billion dollars.

Chinese travel to Texas is primarily for business but leisure travel is not far behind and increasing. Leisure travel from China to Texas as the main purpose of trip is more prevalent than in Japan or India and the Chinese are more likely to add leisure to a business trip. Travelers from China enjoy activities such as shopping, visiting historic sites and dining out. In addition to these activities, a large portion of this market seeks out Western heritage experiences while traveling in the state. Self-driving tours are a relatively new trend that is becoming more common with this market, while traditional group travel remains the norm for their trip.

With a booming growth of China's outbound tourism, recent years have seen a huge increase in the number of direct flights connecting China's domestic cities to international destinations. Chinese outbound travelers are now the biggest driver of growth for airlines based in the region. New air service from Shanghai and Beijing to Dallas-Fort Worth provides greater ease of travel for visitors from this market.

In November 2014, the U.S. and China mutually agreed to increase the visa validity for short-term business travelers, tourists, and students. Under the new visa policy, Chinese travelers can continually visit the U.S. for ten years on a single visa. It's predicted that the new policy will result in up to 7.3 million Chinese visitors to the US by 2021, with an economic impact of \$85 billion, according to a report by the US Department of Commerce.

## VISITOR DATA:

An estimated 101,000 travelers from China visited Texas in 2014, an increase of 87% from the previous year. Additional air capacity, growth in travel from the Chinese market nationally and an increase in Texas market share all contributed to the expanding market. Travelers from China stayed an average of 24.4 nights in Texas and generated \$224 million in direct spending. Travel from China to Texas is forecasted to increase by 61.6% by 2020.

CHINA TO TEXAS (2014)
Visitor Volume: 101,000
Direct Travel Spending: \$224 million
Avg Nights: 24.4

Arrivals from China to the United States in 2014 were estimated at 2.19 million, an increase of 21%. China surpassed Germany to become the 6<sup>th</sup> largest international market in the United States by arrivals. Following nearly a decade of double-digit growth annually, China is now second to Canada when ranked by direct spending. Long lengths of stay and high average spending contributed to \$23.8 billion in direct spending from Chinese travelers in 2014, an increase of 13%. Travel from China to the United States is projected to increase by 163.1% by 2020 with an annual growth rate of 17.5%.





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# TEXAS TOURISM FY 2016 MARKETING PLAN

*China*

## MARKETING ACTIVITIES:

Texas Tourism is increasing activities in China to reflect the growing importance of this market. Beijing and Shanghai will continue to be primary targets through the Fiscal Year 2016 although new markets within China will continue to be explored. For example, the Asia Trade and Media Mission in October 2015 will include Chengdu for the first time. One of the largest travel trade shows in China is the China Outbound Travel and Tourism Market in April 2016 in Beijing. A sales mission to Guangzhou and Shanghai is being planned to complement this show. FAM trips (trade and media), consumer promotions, and online activities including social (Weibo and WeChat) will be pursued as opportunities are presented throughout the year.

<u>Event</u>	<u>Date</u>	<u>Locations</u>
OUTDOOR FUN China Mission Roadshow September 8 -18, 2015 Beijing, Shanghai, Wuhan, Chengdu	Sept 8 -18, 2015	Beijing, Shanghai, Wuhan, Chengdu, China
Asia trade and Media mission	Oct 19-27, 2015	Chengdu, Shanghai, Beijing, China
China Outbound Travel & Tourism Market Summit (COTTM Summit)	Oct 27-28, 2015	Guangzhou, Shenzhen, China
China International Travel Mart (CITM)	Nov 13-15, 2015	Kunming, China
Mini Sales Media Mission conjunction with COTTM	April 7- 11, 2016	Guangzhou, Shanghai, China
China Outbound Travel & Tourism Market (COTTM)	April 12-14, 2016	Beijing, China
Guangzhou International Travel Fair (GITF)	Feb 25 - 27 2016	Guangzhou, China
Active America China Summit	March 16 - 18, 2016	Fort Worth, Texas



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# TEXAS TOURISM FY 2016 MARKETING PLAN

*Japan*

## OVERVIEW:

The cowboy experience, national parks, and wide open spaces found across the state are a main attractor for visitors from Japan to the Texas. Japanese travelers to the United States and Texas rely primarily on travel professionals for trip planning - more than almost any other international traveler segment. For Texas, business travel from Japan comprises a larger share of total travel when compared to the United States.

Increase air service from Japan continues to expand access to the Texas market. The newest flight to Texas will begin in 2015 by All Nippon Airways from Tokyo to Houston, in addition to the current two daily flights from Tokyo to DFW via American Airlines and United Airlines daily flight from Tokyo to Houston.

## VISITOR DATA:

An estimated 57,000 travelers from Japan visited Texas in 2014, a decrease of 24% over the previous year. The decline follows a large increase from the market in 2013 and was primarily driven by shifts in travel among those visiting for VFR and student/education purposes. Japanese visitors spent an average of 9.8 nights in Texas generating \$78 million in direct spending. Travel from Japan to Texas is forecasted to increase by 5.1% by 2020.

Arrivals from Japan to the United States in 2014 were estimated at 3.58 million, a decline of 4%. Despite limited growth from the market in the past decade Japan remains the 4<sup>th</sup> largest international market for the US by arrivals. Direct spending from Japan was estimated at \$17.3 billion, a decrease of 2% over the previous year. Travel from Japan to the United States is forecasted to increase by 3.0% by 2020 with an annual growth rate of less than 1%.

JAPAN TO TEXAS (2014)
Visitor Volume: 57,000
Direct Travel Spending: \$78 million
Avg Nights: 9.8

## MARKETING ACTIVITIES:

Texas Tourism will continue to focus on targeting tour operators to maintain and generate new Texas packages but will also incorporate activities targeting consumers. For Fiscal Year 2016, the first planned activity is the Japanese Association of Travel Agents (JATA) tourism forum and travel showcase in Tokyo, Japan in September 2015. Ongoing activities in the market include FAM trips, consumer promotions, press releases, newsletters, participating in travel trade events and promoting a Japanese micro-site and other activities online.

Travel Trade and Sales Mission:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
Japanese Association of Travel Agents/Tourism Forum & Travel Showcase (JATA) and Mini-Sales Mission	Sept 24-27, 2015	Tokyo, Japan
Japanese Sales & Media Mission ( in conjunction with JATA)	Sept 28-29, 2015	Osaka, Japan



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# TEXAS TOURISM FY 2016 MARKETING PLAN

## South Korea

### OVERVIEW:

VISA Waiver status for travelers from South Korea to the United States in 2013 continues to impact travel from the market. The Korean traveler is primarily in Texas for business as they often have business ties to the state through companies like Samsung. Currently direct air service is available from Seoul to DFW via American Airlines and from Seoul to both DFW and Houston via Korean Air. Although they may be visiting Texas on business, Korean travelers enjoy shopping and Western Heritage activities in Texas. Experience local culture and iconic scenery.

### VISITOR DATA:

An estimated 28,000 travelers from South Korea visited Texas in 2014, an increase of 3.7% over the previous year. These visitors stayed for an average of 41.8 nights and generated \$82 million in direct spending. Travel from South Korea to Texas is forecasted to increase by 36.3% by 2020 with an annual growth rate of 5.3%.

SOUTH KOREA TO TEXAS (2014)	
Visitor Volume:	28,000
Direct Travel Spending:	\$82 million
Avg Nights:	41.8

Arrivals from South Korea to the United States increased by 7% in 2014 to 1.45 million, the fifth consecutive year of record breaking arrivals. Direct spending from South Korea was estimated at \$7.8 billion, an increase of 10%. Travel from South Korea to the United States is forecasted to increase by 29.0% by 2020.

### MARKETING ACTIVITIES:

Texas Tourism will continue with representation in South Korea in Fiscal Year 2016 allowing further development of brand awareness in both trade and media relationships. Texas Tourism will continue to conduct familiarization tours for media and trade throughout the year when the opportunity arises.

Travel Trade and Sales Mission:		
Event	Date	Location
Hana Tour Travel Trade Show	May 2016	Seoul, South. Korea



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# TEXAS TOURISM FY 2016 MARKETING PLAN

## *Australia*

### OVERVIEW:

The average Australian traveler books travel in order to have fun, visit new places, to relax mentally and to experience something new, this includes the cowboy experience, culinary adventures and tax free shopping for all budgets. New Zealand and the United States are fairly equal in the number of arriving tourists from Australia. In December of 2015, Air New Zealand will begin direct flights to Houston from Auckland, making Texas even more convenient for arriving tourists from both Australia and New Zealand. The direct flight from Sydney, Australia to DFW on Qantas has been such a success that the route went from six days per week to seven with increased capacity on the Airbus 380. Exchange rates for the US dollar have fluctuated and have made travel to the United States more expensive, but an increase in visitation is forecasted.

### VISITOR DATA:

An estimated 79,000 travelers from Australia visited Texas in 2014, an increase of 3.9%. Australian travelers are the most likely to be visiting Texas for leisure among the top origin markets. These visitors stayed an average of 8.8 nights in Texas generating \$95 million in direct spending. Travel from Australia to Texas is forecasted to increase by 43.4% by 2020.

AUSTRALIA TO TEXAS (2014)
Visitor Volume: 79,000
Direct Travel Spending: \$95 million
Avg Nights: 8.8

Arrivals from Australia to the United States increased by 6% in 2014 to 1.28 million. Over the past decade arrivals from the market have doubled with consistent annual growth. Direct spending from Australia was estimated at \$6.1 billion, a decline of 10% that was possibly influenced by a weakening Australian dollar. Travel from Australia to the United States is forecasted to increase by 43.4% by 2020 with an annual growth rate of 6.2%.

### MARKETING ACTIVITIES:

In order to increase awareness and demand for Texas' many travel products, Texas Tourism promotes the state's travel product directly to Australian consumers through various media activities, advertising and co-op marketing opportunities. Packaged travel obtained from travel agents or directly from tour operators is still an important part of the Australian travelers purchasing process. For this reason, Texas Tourism partially focuses marketing efforts on tour operators and travel agents to increase Texas product offering and consumer knowledge of the destination. To help achieve these goals, Texas Tourism coordinates a presence in Australia for the Visit USA roadshows as well as travel agent training and familiarization tours for travel trade and media.

<u>Event</u>	<u>Date</u>	<u>Locations</u>
Visit USA – Australia & New Zealand Roadshow	Feb 15 – 23, 2016	Melbourne, Sydney, Brisbane, Australia & Christchurch, Auckland, New Zealand



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# TEXAS TOURISM FY 2016 MARKETING PLAN

## *Meetings Market*

### OVERVIEW:

For Texas Tourism, the meetings market includes meetings, incentives, convention, exhibition travel, and new airline route development marketing efforts. Texas' central location makes the Lone Star State an attractive and prime destination for meeting planners and business professionals alike. With an amazing number of direct flights and as the home of six international airports - Dallas-Fort Worth, Houston, Austin, San Antonio, El Paso, and McAllen – Texas is a convenient place to reach for meeting, convention and conference attendees.

### VISITOR DATA:

Business travel represented almost 30% of domestic visitation and 40% of domestic direct travel spending in 2014. Nearly half (46%) of domestic business travel to Texas destinations was for attending group meetings (conventions, seminars, etc.) and the remaining was for transient business purposes.

International travelers to Texas are more likely to be traveling for business than the US average, especially for overseas visitors, making this a highly valuable travel segment for the state. In 2014 business travel accounted for one-third of overseas arrivals to the state.

### MARKET ACTIVITIES:

To increase the presence of and promote Texas as a meetings market destination and encourage new airline route development in the state, Texas Tourism markets Texas via several activities throughout the fiscal year to expand the opportunities for state travel industry partners to target domestic and international meetings business.

Travel Trade Shows:		
<u>Event</u>	<u>Date</u>	<u>Locations</u>
World Route Development Forum (World Routes)	Sept 19-22, 2015	Durban, KwaZulu-Natal, South Africa
IMEX America	Oct 13-15, 2015	Las Vegas, NV
Texas Association Market Event in D.C.	Dec 9, 2015	Washington, DC
ASAE Spring Expo	April 28, 2016	Washington, DC
IMEX Europe	April 19-21, 2016	Frankfurt, Germany
ASAE Annual	Aug 13-16, 2016	Salt Lake City, UT